

LISTING OF CLAIMS

If entered, this listing of claims replaces all prior listings of claims in the present application.

1. (Currently Amended) A method in a computer system comprising:
defining a forecast snapshot, wherein
the defining comprises:
receiving an interval, wherein
the interval specifies a frequency at which forecast snapshots are generated,
receiving a specified day within the interval, wherein
the forecast snapshot is generated on the specified day, and
receiving specified roles of participants, wherein
the forecast snapshot comprises information regarding a member of the
organization, and
the information indicates the member is assigned one of the specified roles;
**causing a processor of the computer system to determine if a valid reporting hierarchy of
the participants has been defined;**
**causing the processor to generate an indication of validity, in response to a determination
that the valid reporting hierarchy of the participants has been defined;**
in response to the indication of validity, causing [[a]] the processor of the computer system
to automatically generate the forecast snapshot, wherein
~~**the causing the processor to automatically generate the forecast snapshot comprises**~~
~~**causing the processor to validate a hierarchy of the participants,**~~
the forecast snapshot is based on opportunity information of the participants, and
the forecast snapshot comprises[[:] the opportunity information; and
causing the processor to automatically send an alert notifying the participants of the generation
of the forecast snapshot.
2. (Previously Presented) The method of claim 1 wherein a participant of the participants
updates the forecast snapshot in response to the alert.
3. (Cancelled)

4. (Cancelled)
5. (Cancelled)
6. **(Currently Amended)** The method of claim 1 wherein the hierarchy comprises more than one level, and the validating comprises :
 - detecting whether a participant of the participants is included at more than one level of the hierarchy, **and**
 - detecting whether there exists only one root in the hierarchy of participants.**
7. (Previously Presented) The method of claim 6 further comprising when the hierarchy of participants is invalid:
 - notifying a user; and
 - correcting the hierarchy.
8. **(Currently Amended)** The method of claim 1 wherein the generating further comprises: for each participant **of the participants**, retrieving opportunity information ~~for that participant~~; and generating **a** forecast ~~summaries~~ **summary** in accordance with ~~[[a]]~~ **the** hierarchy of the participants, **wherein**
the forecast summary is based on the opportunity information retrieved for each participant of the participants.
9. (Previously Presented) The method of claim 1 wherein the forecast snapshot is associated with a forecast period.

10. (Currently Amended) The method of ~~claim 9 wherein the forecast period is a quarter~~
claim 8, wherein the forecast snapshot further comprises:

the forecast summary, wherein

the forecast summary comprises one or more data fields based on processing
of the opportunity information, and

the processing of the opportunity information comprises:

generating an expected revenue based on an adjustment of forecasted
revenue by probabilities of an opportunity,

generating the forecasted revenue by summing revenue of at least one
opportunity;

a best case based on a prediction of the forecasted revenue; and
an audit trail of edits to the forecast summary.

11. (Previously Presented) The method of claim 9 further comprising: receiving an indication of the forecast period.

12. (Original) The method of claim 1 wherein the forecast snapshot is automatically generated based on the day and interval.

13. (Currently Amended) A computer system comprising a processor and a memory,
wherein the memory stores program instructions executable by the processor to:

~~a component configured to~~ define a forecast snapshot, wherein

~~the component for defining a~~ the definition of the forecast snapshot comprises:

~~a component configured to receive~~ receiving a schedule, wherein

the schedule specifies a frequency at which forecast snapshots are created,

and

~~a component configured to receive~~ receiving an indication of participants,

wherein the forecast snapshot comprises information regarding the
participants;

cause the processor to determine if a valid reporting hierarchy of the participants has been
defined;

cause the processor to generate an indication of validity, in response to a determination that the valid reporting hierarchy of the participants has been defined;

~~a component configured to~~ in response to the indication of validity, automatically generate

~~[[a]]~~ the forecast snapshot, wherein

~~the component configured to automatically generate the forecast snapshot~~

~~comprises a sub-component configured to validate a hierarchy of the participants,~~

the forecast snapshot is based on opportunity information of the participants, and

the forecast snapshot comprises the opportunity information; and

~~a component configured to~~ automatically send an alert to the participants indicating ~~that a~~ the forecast snapshot has been created.

14. (Previously Presented) The computer system of claim 13, wherein
the schedule is based on a user-defined interval, and
the participant updates forecast information in response to the notifying.

15. (Currently Amended) The computer system of claim 13 wherein the ~~sub-component~~
the computer system is further configured to
~~validate the hierarchy of the participants is further configured to~~ perform validation
during the defining of the forecast snapshot.

16. (Currently Amended) The computer system of claim 15 further comprising
a notification component configured to notify a user, if the hierarchy of participants is
invalid; and
a correction component configured to facilitate correcting the hierarchy, if the hierarchy
of participants is invalid.

17. (Currently Amended) The computer system of claim 13 wherein the ~~component~~
~~configured to generate the forecast snapshot~~ the computer system is further configured to:
for each participant of the participants, retrieve opportunity information ~~for that~~
~~participant~~; and

generate a forecast summaries summary in accordance with ~~[[a]]~~ the hierarchy of the participants, wherein

the forecast summary is based on the opportunity information retrieved for each participant of the participants.

18. (Currently Amended) The computer system of ~~claim 13 wherein the forecast snapshot is associated with a forecast period~~ claim 17, wherein the forecast snapshot further comprises:

the forecast summary, wherein

the forecast summary comprises one or more data fields based on processing of the opportunity information, and

the processing of the opportunity information comprises:

generating an expected revenue based on an adjustment of forecasted revenue by probabilities of an opportunity,

generating the forecasted revenue by summing revenue of at least one opportunity;

a best case based on a prediction of the forecasted revenue; and
an audit trail of edits to the forecast summary.

19. (Original) The computer system of claim 13 wherein participants are indicated by their roles.

20. (Currently Amended) A computer-readable storage medium comprising instructions executable to implement a method, the method comprising:

receiving a schedule for generating forecast snapshots;

receiving an indication of participants to be included in the forecast snapshots;

determining if a valid reporting hierarchy of the participants has been defined;

generating an indication of validity, in response to a determination that the valid reporting hierarchy of the participants has been defined;

in response to the indication of validity, automatically generating a forecast snapshot based on opportunity information of the participants, wherein

~~the automatically generating the forecast snapshot comprises validating a hierarchy of the participants,~~

the forecast snapshot comprises the opportunity information, and
the forecast snapshot is generated in accordance with the schedule; and
automatically sending an alert notifying the participants of the generation of the forecast snapshot.

21. (Previously Presented) The computer-readable storage medium of claim 20 wherein the schedule is based on an interval.

22. (Previously Presented) The computer-readable storage medium of claim 21 wherein the schedule specifies a day within the interval.

23. (Previously Presented) The computer-readable storage medium of claim 20 wherein the participants are indicated by their roles within an organization.

24. (**Currently Amended**) The computer-readable storage medium of claim 20 wherein the hierarchy comprises more than one level, and the validating comprises :
detecting whether a participant of the participants is included at more than one level of the hierarchy, and
detecting whether there exists only one root in the hierarchy of participants.

25. (Previously Presented) The computer-readable storage medium of claim 24 further comprising:

notifying a user, if the hierarchy of participants is invalid; and
correcting the hierarchy, if the hierarchy of participants is invalid.

26. (**Currently Amended**) The computer-readable storage medium of claim 20 wherein the automatically generating the forecast snapshot comprises:

for each participant of the participants, retrieving opportunity information ~~for that participant~~, and

generating a forecast summaries summary in accordance with [[a]] the hierarchy of the participants, wherein

the forecast summary is based on the opportunity information retrieved for each participant of the participants.

27. (Currently Amended) The computer-readable storage medium of ~~claim 20 wherein~~ each forecast snapshot is associated with a forecast period claim 26, wherein the forecast snapshot further comprises:

the forecast summary, wherein

the forecast summary comprises one or more data fields based on processing of the opportunity information, and

the processing of the opportunity information comprises:

generating an expected revenue based on an adjustment of forecasted revenue by probabilities of an opportunity,

generating the forecasted revenue by summing revenue of at least one opportunity;

a best case based on a prediction of the forecasted revenue; and

an audit trail of edits to the forecast summary.